



## **King County**

### **Healthy Workplace Funding Initiative—2007**

#### **Approval of Expenditures**

The 2007 Executive Budget includes funding for the Healthy Workplace Funding Initiative to support departments' strategies for facilitating employees in making changes and sustaining healthier choices and behaviors. Funds are provided as a separate line item in the 2007 operating budget of each department. Funding for 2007 is provided at the rate of \$25.00 per covered employee.

Because active employee involvement is central to a healthy workplace, departments are required to involve employees in determining the most effective use of available funds.

Expenditures of Healthy Workplace Funding Initiative funds are governed by the following criteria and approval process:

#### **Expenditures:**

- Must be for the purpose of encouraging or facilitating healthy eating (a.k.a. "eat smart") or physical activity (a.k.a. "move more") in the workplace or during the work day;
- Must be the result of a process involving management and employees (and organized labor for represented employees);
- Must be for activities, facilities improvements or programs that benefit the greatest number of work place employees;
- Must be within Healthy Workplace funding budget thresholds or may be augmented from existing funds that are reallocated within the department's adopted budget (with permission);
- Must be accomplished in accordance with King County approved policies and procedures for the procurements of goods and services (must be documented in a properly executed contract or purchase order); and
- Must be marked or acknowledged in the workplace as goods or services provided through the Healthy Workplace Funding Initiative.
- Must be used for the calendar year for which the proposal was submitted; funds are not eligible for carry over.
- Consumable items must be consumed at the work place.

**Approval:**

An Oversight Committee chaired by the manager of Executive Audit Services is charged with validating that proposed expenditures meet the expenditure criteria described above.

Application for proposed expenditures must be submitted to the Oversight Committee before funds can be expended. The committee will ensure that proposed expenditures are in accordance with the expenditure criteria for use of Healthy Workplace Initiative funds.

Approval process:

- The fully completed application for the expenditure must be submitted. The application must include: a description of the proposed expenditure, a statement of the objectives of the expenditure, and a description of the employee/management process involved in preparing the proposed funding request;
- Proposed expenditures will be reviewed and processed by the committee within 5 business days of receipt; and
- Any issues or concerns about proposed expenditures identified by the Oversight Committee will be shared with labor representatives, if applicable. If the Oversight Committee and labor representatives cannot come to an agreement, these issues or concerns will be referred to the Policy Committee for the Health Reform Initiative for final approval or denial.
- No applications will be accepted after December 14, 2007

**Categories:**

Healthy Workplace Funding Initiative funds are for work groups or for workplaces to make purchases that reflect healthy eating habits and physical activity. The use of Healthy Workplace Initiative funds should focus on the following categories:

- **Programs/classes/activities.** One-time or multi-session classes to support health/fitness. The program/class must be made available to groups of employees, although employees are *not* required to attend. Examples include nutrition classes, exercise/fitness classes, and weight management programs.
- **Purchase for individuals.** Purchasing items for individuals is acceptable, but with a caveat. Items may be purchased for individuals to use, but not distributed as personal property. For example, you can buy 10 pedometers for 15 employees to share. Or you can purchase one pedometer per person and assign them to employees.
- **Purchase for group.** A purchase that benefits a group of employees. Examples include: refrigerator, some types of exercise equipment, and health book/video/DVD lending library collections.

For examples of acceptable and not acceptable uses of the Healthy Workplace Funding Initiative funds please visit: <http://www.metrokc.gov/employees/hwfi/default.aspx>

## Healthy Workplace Funding Initiative Application

The following application must be fully completed, submitted and approved prior to any Healthy Workplace Funding Initiative expenditures.

Department: \_\_\_\_\_

Division: \_\_\_\_\_

Section: \_\_\_\_\_

The following contact information will be used for questions and/or approval of funds and will be made available on the Focus on Employees website as a resource for employees.

Name: \_\_\_\_\_

Job title: \_\_\_\_\_

Phone number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Interoffice mail stop: \_\_\_\_\_

Department Director signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Purchase Description:

1. What are you purchasing? Check all that apply:

\_\_\_\_ Programs/Classes/Activities; please describe: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_ Equipment/Materials; please describe: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_ Consumables/Services; please describe: \_\_\_\_\_

\_\_\_\_\_

2. What is the goal/what are the objectives of the purchase?

3. Describe the process by which employee feedback was solicited?

**Return completed application to:** David Lawson, Manager, Executive Audit Services. MS: BOA-EX-3200. Notice of approval or elevation of the issue to the labor representatives will be within 5 working days of receipt.

## Healthy Workplace Funding Initiative Checklist

Place a check in each check box that applies. The first two check boxes must be checked for the application to be considered for approval.

### USE THIS SECTION FOR ALL REQUESTS (BOTH ITEMS MUST BE CHECKED)

- ☐ Purchase/action supports one of the following focus areas:
  - Healthier eating/nutrition
  - Increasing physical activity
- ☐ The item/activity/program has input from employees

### USE THIS SECTION FOR PROGRAMS, CLASSES, OR ACTIVITIES

- ☐ Program, class, or activity will not encroach on work time (that is, the class is on employee's time)—or— Program has management approval to be done during work time.
- ☐ There is research that shows the program, class, or activity is effective
- ☐ The format of the program, class, or activity is appropriate. For example, a lecture-style presentation/class is used to communicate information and small, multi-session classes are used to teach a new skill.
- ☐ The program, class, or activity does not have associated products, such as books or food that are mandatory for the employee to purchase to enjoy the full benefit of the program, class, or activity.
- ☐ The vendor for the program, class, or activity must be chosen through the solicitation process with Procurement—or—chosen from the list of qualified programs, classes, or instructors (if available)

### USE THIS SECTION FOR PURCHASE FOR INDIVIDUALS

- ☐ A majority of employees will benefit from purchase
- ☐ Purchase will not encroach on work time—or—management agrees to pay county employees for time

### USE THIS SECTION FOR PURCHASE FOR GROUP

- ☐ A majority of employees will benefit from purchase.
- ☐ Purchase will not encroach on work time—or—management agrees to pay county employees for time.

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